



Washington State Transportation Commission
Ferry Riders Opinion Group (FROG) Survey Panel
June 2018 WSF Reservation Survey
Presentation

Methodology



- ▶ Online Survey of Washington State Ferry Riders Opinion Group (FROG) survey panel.
- ▶ A total of 4,988 surveys were completed in July 2018 (July 9 – August 3, 2018).
- ▶ Data was weighted by route according to the June 2018 WSF traffic report, based on the last trip taken.
- ▶ Total & sub-group sample sizes and definitions:

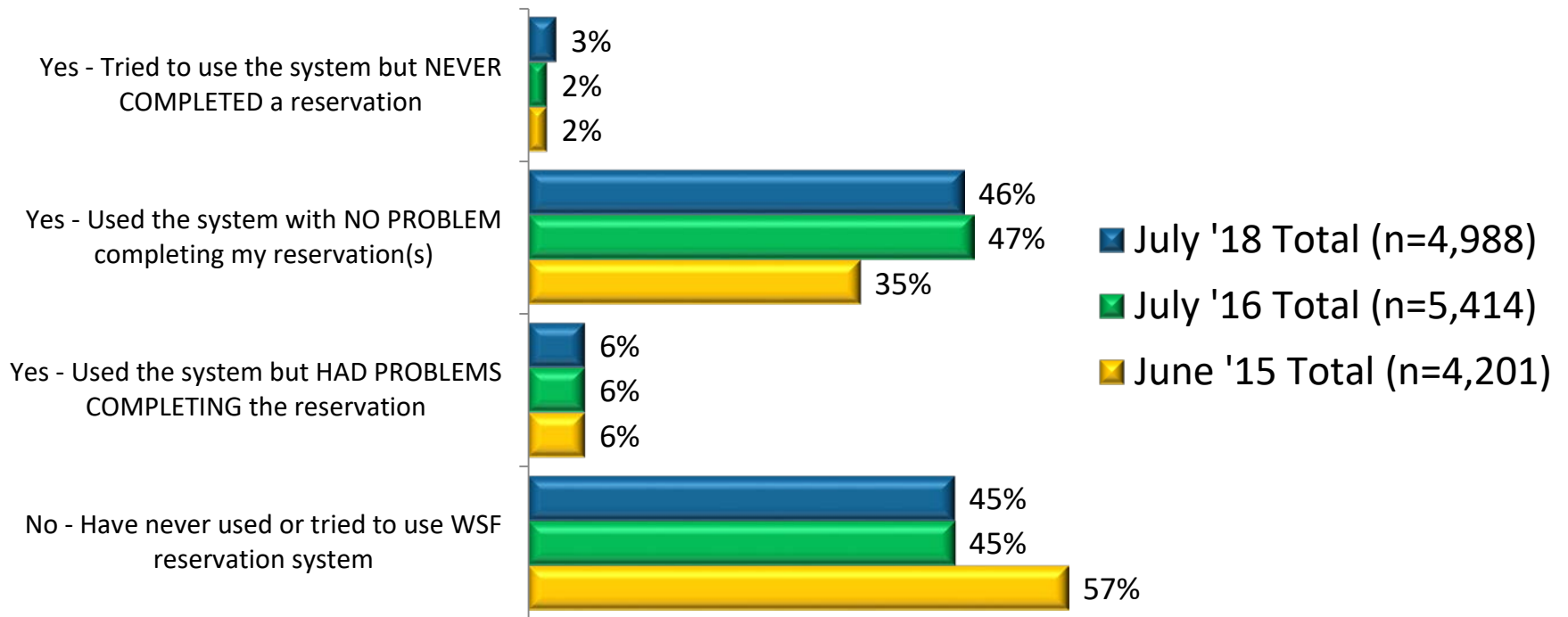
Sample	Graph Name	Definition
4,988	Total	Total number of completed surveys system-wide
1,610	SJ Riders	Riders that used the San Juan / Inter-Island routes last
64	BC Riders	Riders that used the Sidney BC route last
278	PT Riders	Riders that used the Port Townsend – Coupeville route last
955	Full Time SJ	Full time SJ Island residents that used SJ routes last
468	SJ Island	Permanent residents of San Juan Island
348	Orcas Island	Permanent residents of Orcas Island
181	Lopez	Permanent residents of Lopez Island
418	Dissatisfied Users	Reservation users that are dissatisfied with the system
2,611	Satisfied Users	Reservation users that are satisfied with the system
1,952	Res Routes	Riders who last used one of the three reservation routes
3,035	Non-Res Routes	Riders who last used a non-reservation route

Ever Used WSF Reservation System



Similar to 2016, fifty five percent (55%) of the FROG panel members responding to the 2018 survey have used or tried to use the WSF reservation system. Again, similar to 2016, approximately 85% of those who used the reservation system had no problems completing their reservation. Eleven percent (11%) that used the system had problems and 5% tried to use the system but never completed the reservation.

WSF Reservation System Usage By All Riders



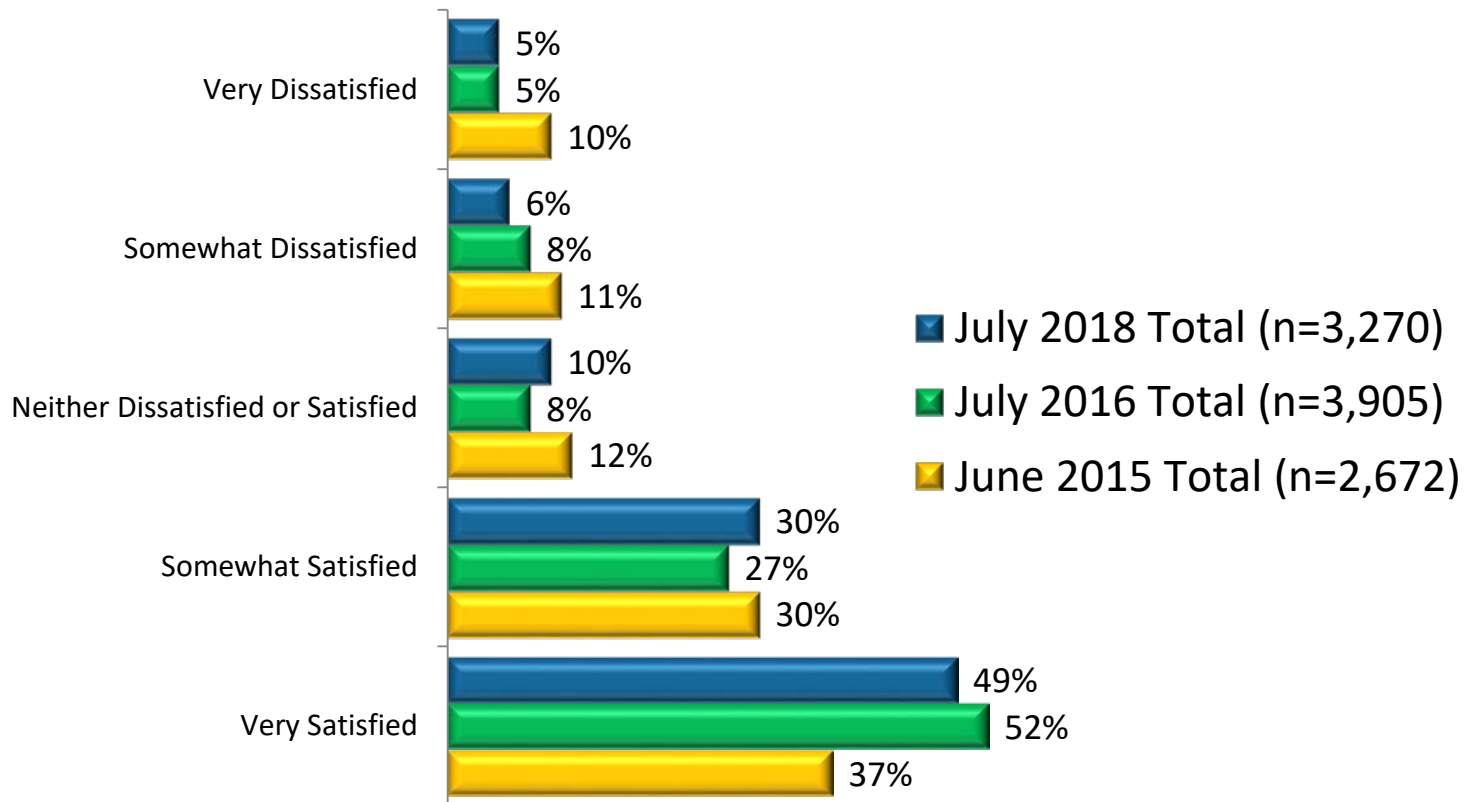
Q.4a Have you ever used or tried to use WSF web/phone reservation program?

Reservation System Rating



The 3,270 riders who have used the WSF reservation system were asked how they would rate it. Similar to 2016, the majority of 2018 users are satisfied with the system (79%) with 11% being dissatisfied. This is an improvement over the results from 2015 but no real change from 2016 (79% satisfaction / 13% dissatisfaction).

WSF Reservation System Rating – All Routes



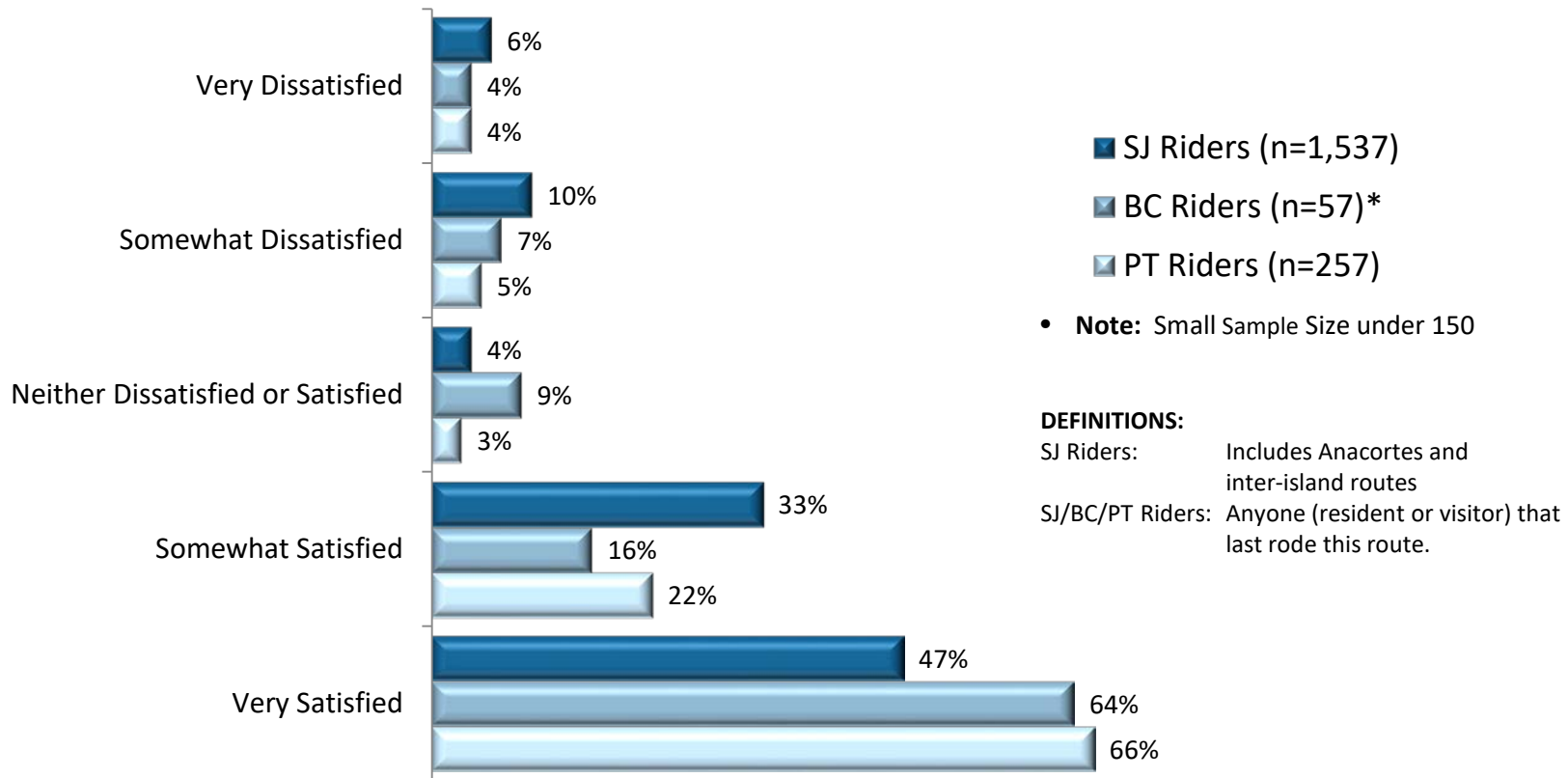
Q.5 Overall, based on your experience, how would you rate the reservation system?

Reservation System Rating



When broken out by last route used, the riders on the Anacortes - San Juan Island routes have a slightly higher level of dissatisfaction (16%) than found on the Anacortes - Sidney (11%) and Port Townsend – Coupeville (9%) routes. However, the dissatisfaction is lower in 2018 (16%) than found in 2016 (21%) for San Juan riders.

WSF Reservation System Rating by Last Route Taken



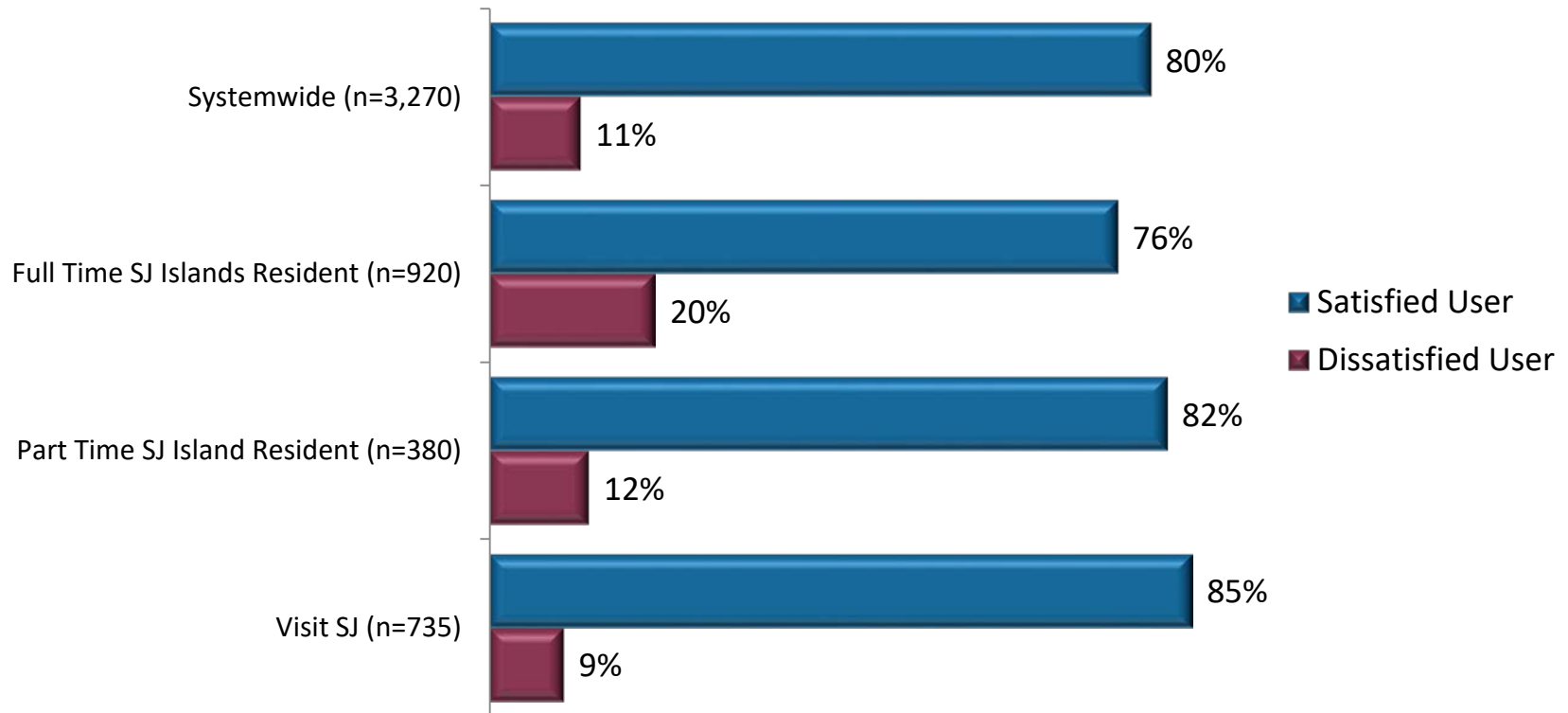
Q.5 Overall, based on your experience, how would you rate the reservation system?

Reservation System Satisfaction Rating



System-wide eleven percent (11%) of reservation users are dissatisfied with WSF reservation system. 20% of full time San Juan residents who use the system are dissatisfied with it. In contrast 9% of San Juan visitors and 12% of part time San Juan residents who used the system are dissatisfied.

WSF Reservation System Satisfaction By Resident/Visitor



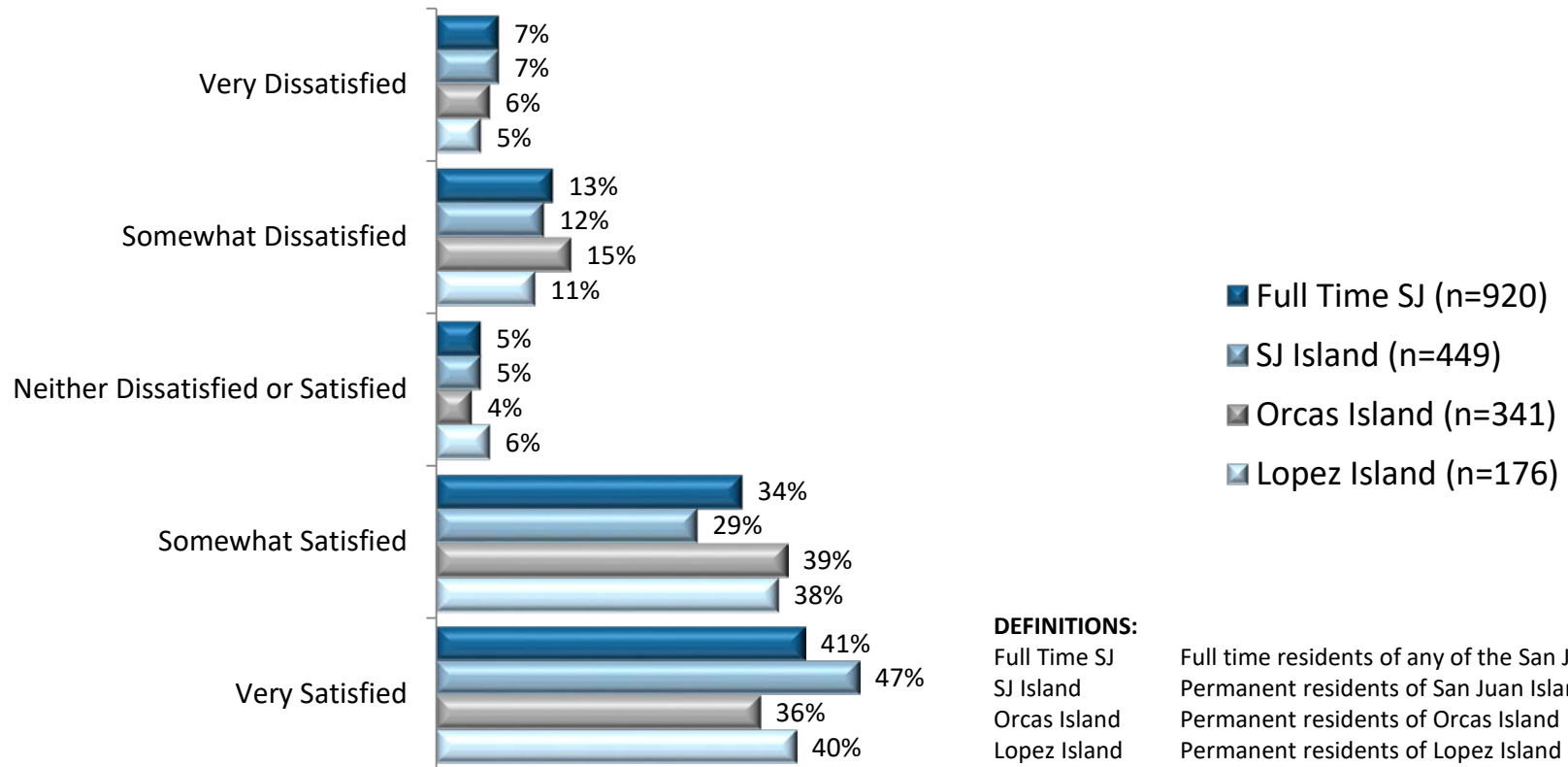
Q.3 Which of the following best describes you? AND Q.5 Overall, based on your experience, how would you rate the reservation system?

Reservation System Satisfaction Rating



Dissatisfaction is down for permanent residents on all islands (20% in 2018 – down from 26% in 2016). When broken out by the San Juan County residency, riders living on Orcas (21% - down from 23% in 2016) are the most dissatisfied (Very + Somewhat) followed by San Juan Island (19% - down from 25% in 2016) and Lopez Island (16% - down from 32% in 2016).

WSF Reservation System Rating - Full Time Resident By Island



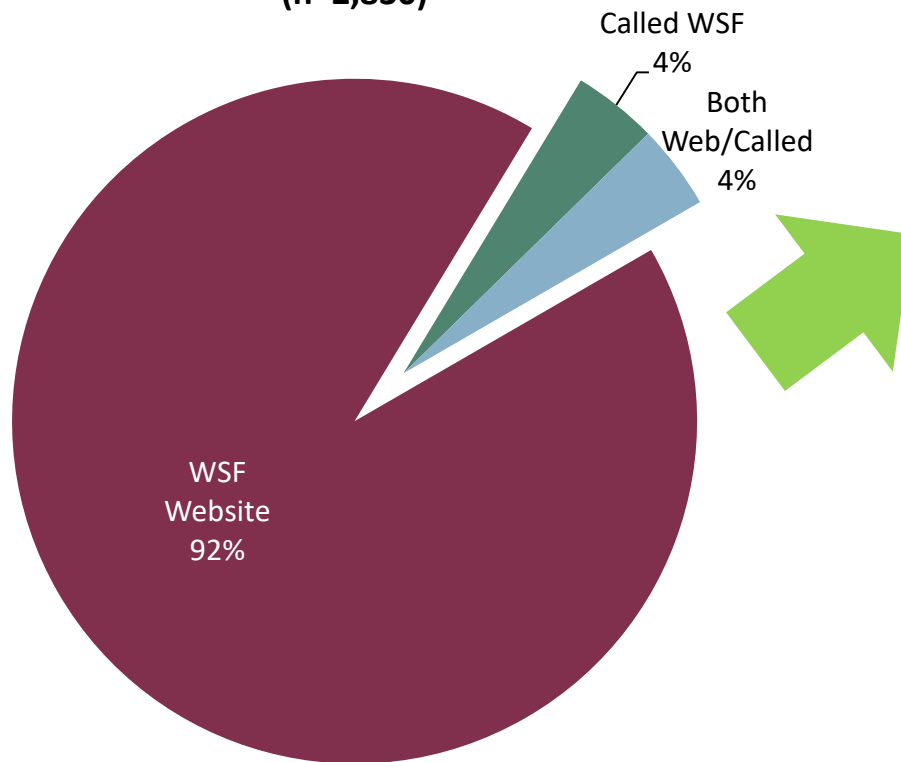
Q.5 Overall, based on your experience, how would you rate the reservation system?

No Reservation Problems

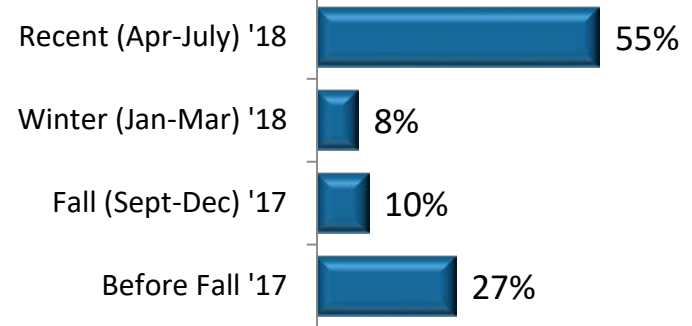


Of the 2,830 riders that have had no problems making reservations, 92% used the WSF website and 4% called WSF, with the majority reporting this activity happened recently (55%).

**Mode of Reservation Contact
(n=2,830)**



**Reservation Contact Period
(multiple mentions)**



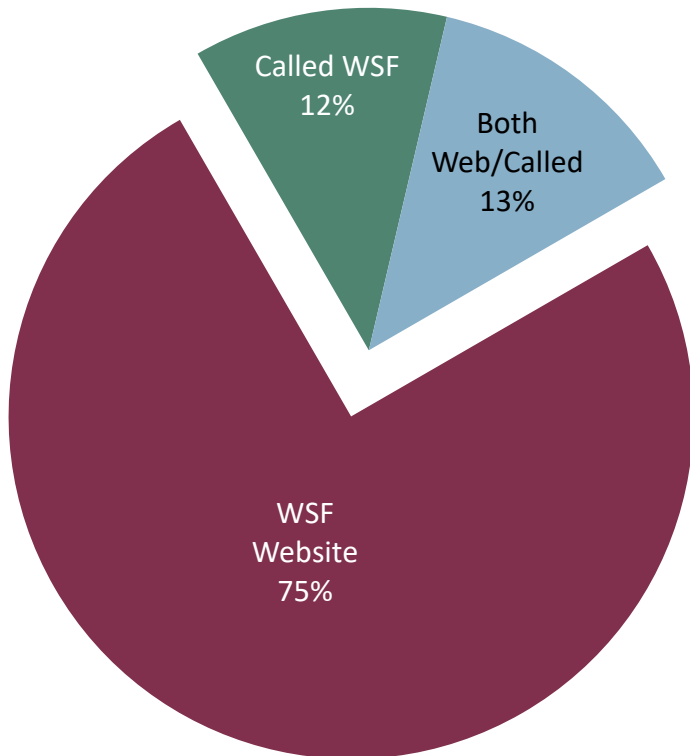
Q4a3a Your LAST reservation was in which month? Q4a3b Which of the following options (web or phone) did you use to complete your LAST reservation?

Had Reservation Problems - Failure Mode

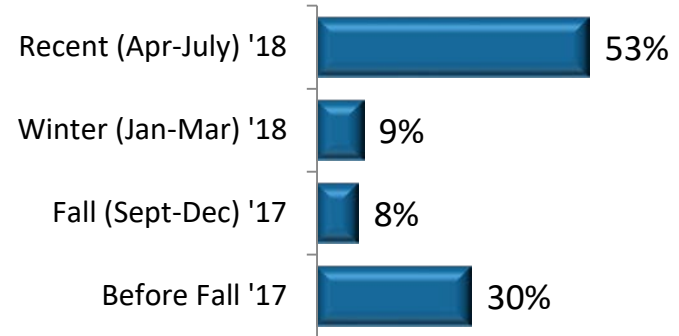


Of the 440 riders that had problems using reservations, 75% used the WSF website and 12% called WSF, with the majority reporting this activity happened in the last four months (53%). The problem was reported as the last time they used reservations in 61% of the cases.

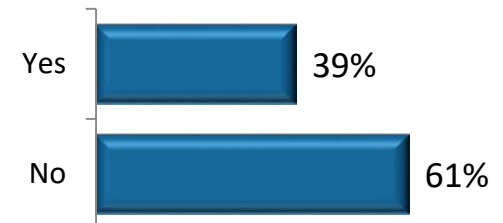
**Mode of Reservation Contact
(n=440)**



**Problem Reservation Contact Period
(multiple mentions)**



Used Reservation Since Last Problem



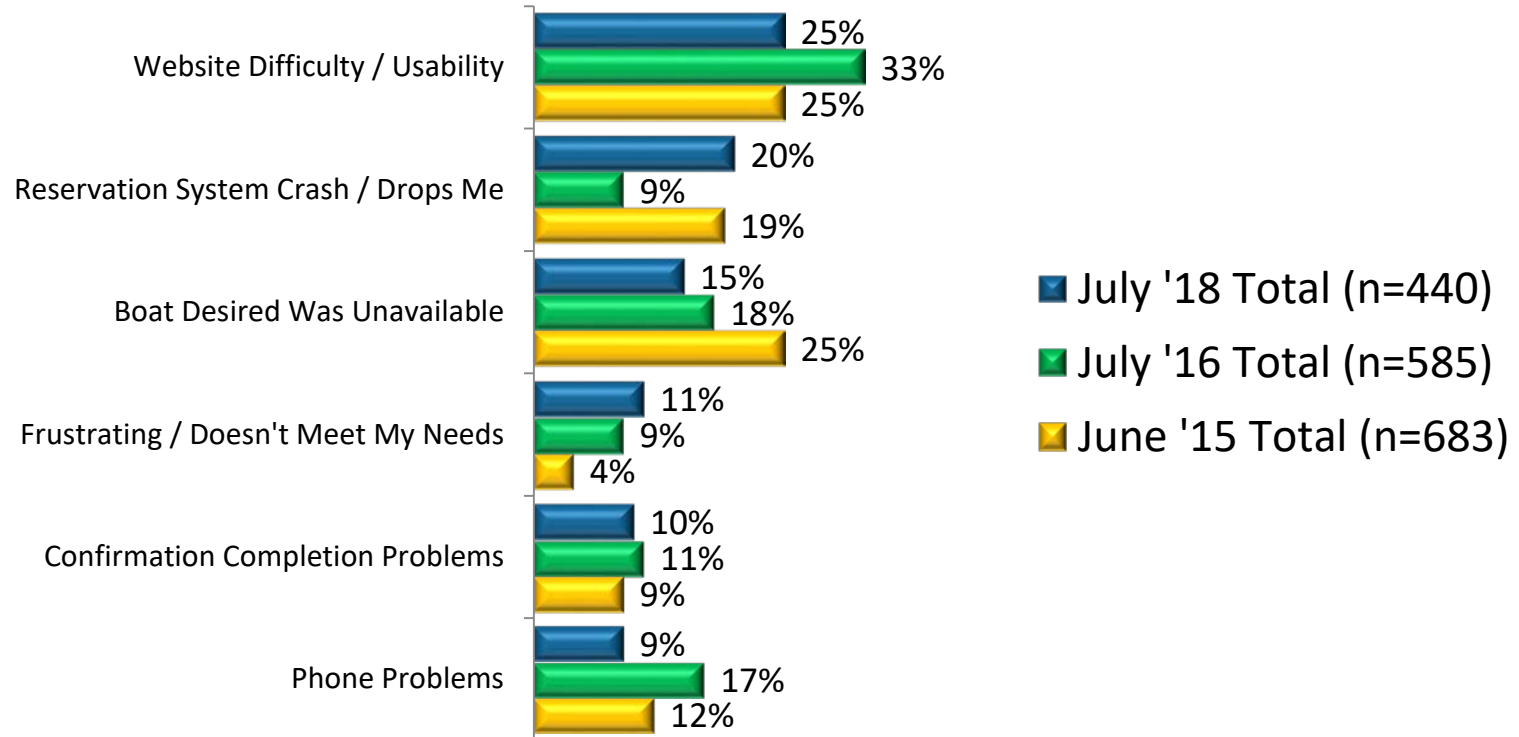
Q4a2a The LAST time you had problems completing your reservation was in which month? Q4a2b Which of the following options (web or phone) did you use the LAST time you had problems completing your reservation? Q4a2d Have you made any further reservations since you had your last problem?

Had Reservation Problems - Failure Reason



Of the 440 riders who had problems completing their reservation, the most mentioned reason was “Website Difficulty/Usability” issues (25%). The next reason for the reservation system failing them is “Reservation System Crash/Drops Me” (20%) and “Boat Desired Was Unavailable” (15%).

Tried To Use WSF Reservation System Reason Why It Failed



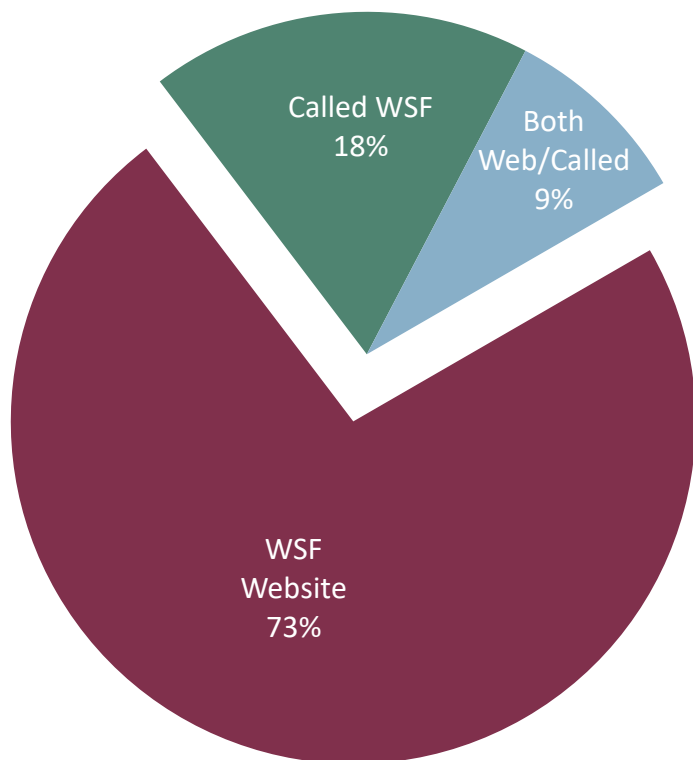
Q.4a2c What issues or problems did you have in completing your reservation?

Tried to Use Reservations - Failure Mode

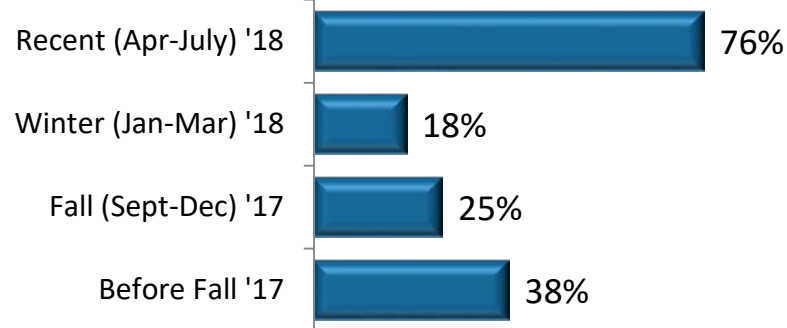


Of the 98 riders that tried to use the program but never completed a reservation, 73% used the WSF website and 18% called WSF, with the majority reporting this activity happened recently (76%). The major reason was the boat desired was unavailable (33%).

**Mode of Reservation Contact
(n=98)**



**Reservation Contact Period
(multiple mentions)**



Top 3 Comments Given

Top 3 Comments Given	Percentage
Boat Desired Unavailable	33%
Website Difficult / Usability	13%
Frustrating / Doesn't Meet My Needs	13%

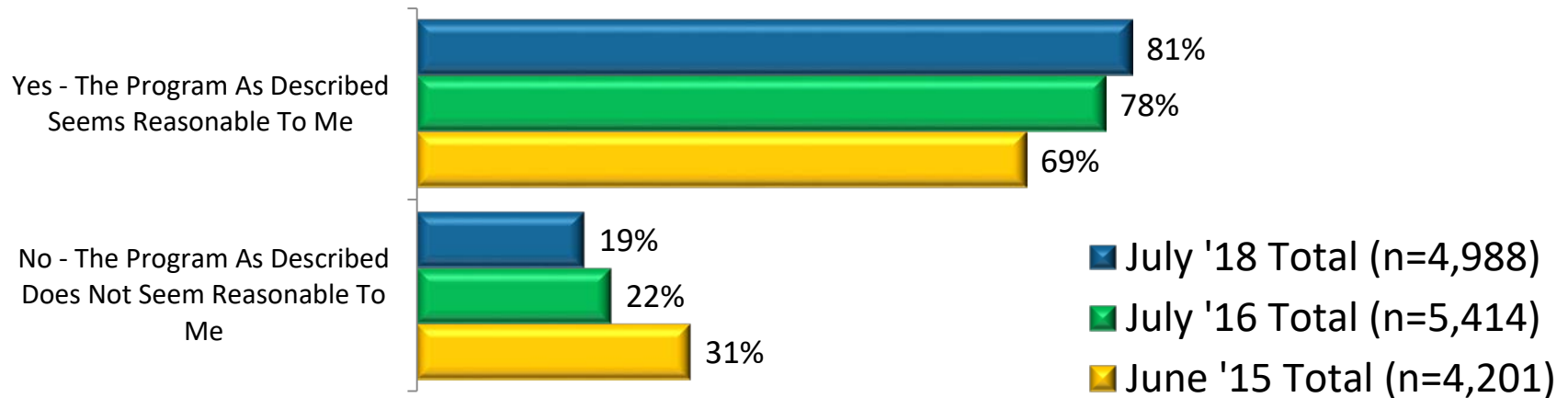
Q4a1a In which of the following months did you try to use WSF web/phone reservation program? Q4a1b Which of the following options (web or phone) did you use when you were unable to complete your reservation? Q4a1c Why were you unable to complete your reservation?

Reservation System Reasonableness



A description of the current WSF reservation system was provided and respondents were asked if it seemed reasonable to them. A majority in 2018 (81%) said it did seem reasonable, while 19% said it seemed unreasonable. This is similar to what was found in 2016 (79%, 22% respectively).

Reasonableness of WSF Reservation Program



Q.7a Reservations have been implemented on limited routes in the North Sound to better accommodate high travel demand on longer routes with consistently large numbers of occasional/recreational riders. Reservations provide predictability around travel times and allows travelers to plan their trips with more reliability. The current approach to reservations is done via a tiered reservation system and here is how it currently works:

For Port Townsend/ Coupeville & Anacortes/ Sidney BC sailings:

All reservations for a sailing schedule season are available two months prior to the start of the season. Up to 80% of the space on the Port Townsend route and 100% of the space on the Anacortes (99% on Sidney B.C.) route can be reserved.

For San Juan sailings:

Reservations are available for up to 90% of the San Juan Island sailing space. Two months ahead of the sailing schedule season, 30% of the regular height space (typically general vehicles) and 100% of all tall height space (vehicles over 7'2" high or over 30' long – typically commercial vehicles/Motorhomes/RVs) becomes available for reservations. At 7 am two weeks prior to any individual travel day, an additional 30% of the regular height space becomes available. The remaining 30% becomes available at 7 am two days prior to the travel day.

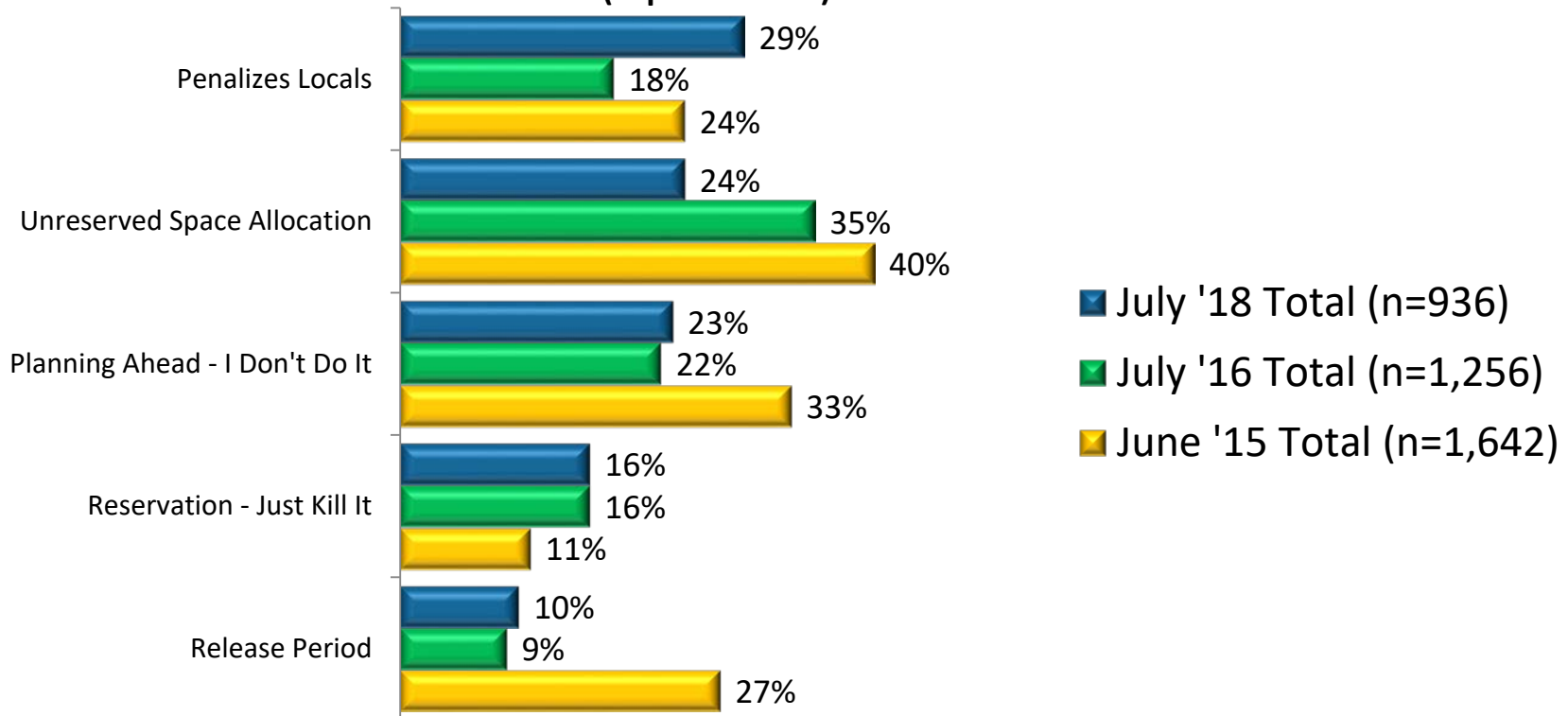
Based upon the above, does the WSF reservation program seem reasonable to you?

Reasons For Being Unreasonable



The 936 riders who felt the reservation system description as presented was unreasonable were asked why and what they might change. The most often mentioned reason for being unreasonable was the “Penalizes Locals” (29%) followed by “Unreserved Space Allocation” (24%) and the rider not liking to “Plan Ahead” (23%). Sixteen percent (16%) said they would just kill the reservation program.

**The Parts Of The Reservation System That Are Unreasonable
(Top 5 Reasons)**



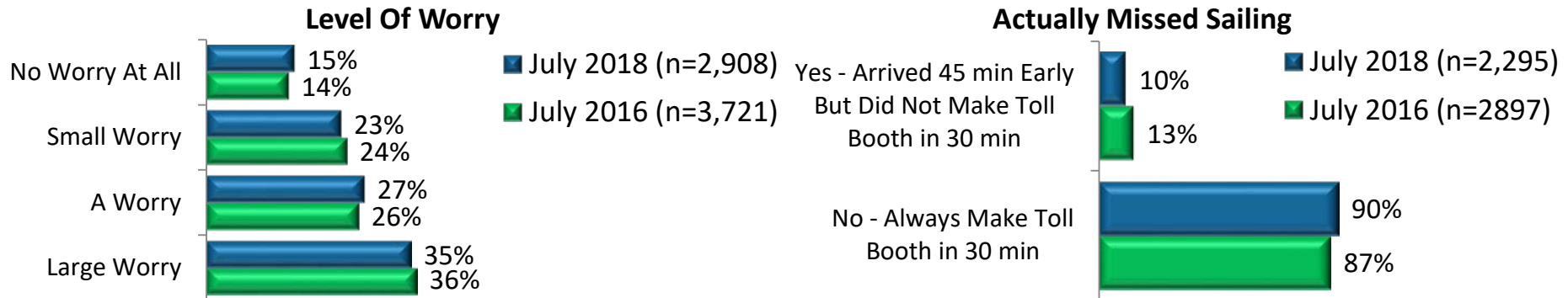
Q.7b Please tell us why it does not seem reasonable to you and how we might change it.

Reservation Check-in Issues



The 2,908 riders who have used the WSF reservation system from Anacortes, Friday Harbor, or Orcas Island were asked about their level of anxiety over not making the tollbooth in time and thus losing their reservation.

- Similar to 2016, 35% in 2018 say it is a large worry while 62% say it is either a worry or large worry to them.
- Similar to 2016, only 10% in 2018 actually have experience not getting to the tollbooth on time.
- Full time San Juan Islands residents worry (“A worry” + “Large Worry”) more so (71% in 2018, 77% in 2016) than part time San Juan Islands residents (64% in both 2018/2016) or San Juan Islands visitors (62% in 2018, 57% in 2016).
- San Juan (74%) and Lopez (72%) residents worry more than Orcas (67%) Island residents.
- Full time San Juan Islands residents have actually missed sailings (18% in 2018, 21% in 2016) more often than part time San Juan Islands residents (11% in 2018, 12% in 2016) or San Juan Islands visitors (7% in 2018, 9% in 2016).
- Actual missed sailings is highest among San Juan (21%) residents following by Orcas (16%) and Lopez (14%).



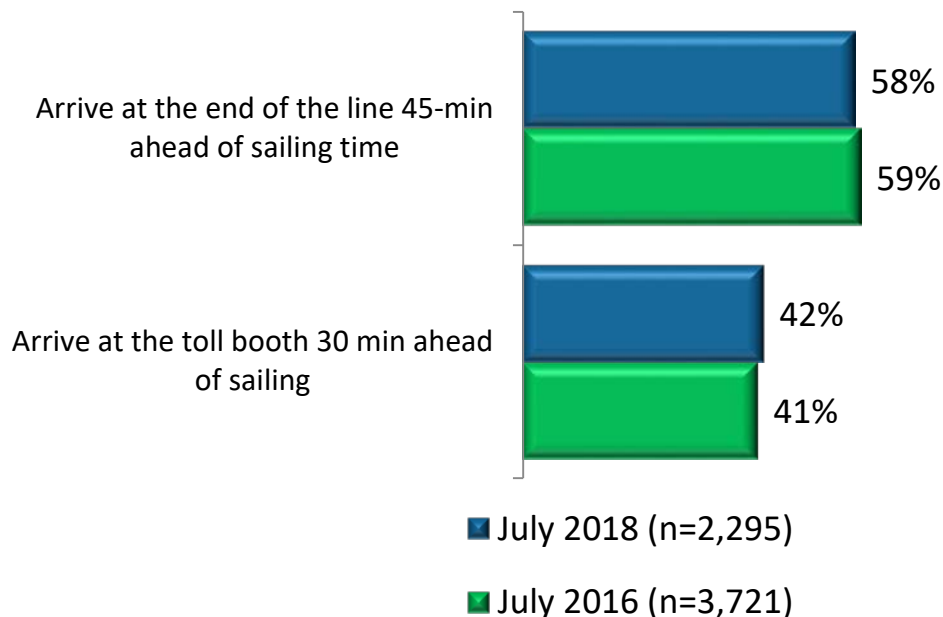
Q6g Background: At Anacortes, Friday Harbor and Orcas Island, vehicles with reservations must check in at the toll booth at least 30 minutes prior to their reserved departure time. Vehicles that do not check in at the toll booth 30 minutes ahead of the reservation time will lose their reservation and just travel standby. Drivers are encouraged to arrive at the end of the line at least 45 minutes prior to their reserved departure time so that they reach the toll booth within 30 minutes of reserved departure time. Drivers are responsible for ensuring that they reach the toll booth 30 minutes in advance of their reservation. Question: During the summer, how big a worry to you is arriving at the terminal within 45 minutes of your reserved departure time, knowing you can lose your reservation if you are late, and thus put on standby because you did not make the toll booth within 30 minutes of your reserved departure time. Q6h During the last 12 months have you ever arrived within 45 minutes of your reserved departure time and not made the tollbooth within 30 minutes of your reserved departure sailing?

Reservation Check-in Issues - “On-Time” Arrival



The 2,295 riders who have used the WSF reservation system from Anacortes, Friday Harbor, or Orcas Island were given two choices and asked to select which they felt WSF should use to determine if you have arrived on time. Similar to 2016, 58% in 2018 said it should be based on their arrival at the end of the line 45 minutes ahead of sailing time.

Determine “On-Time” Arrival, If You ...



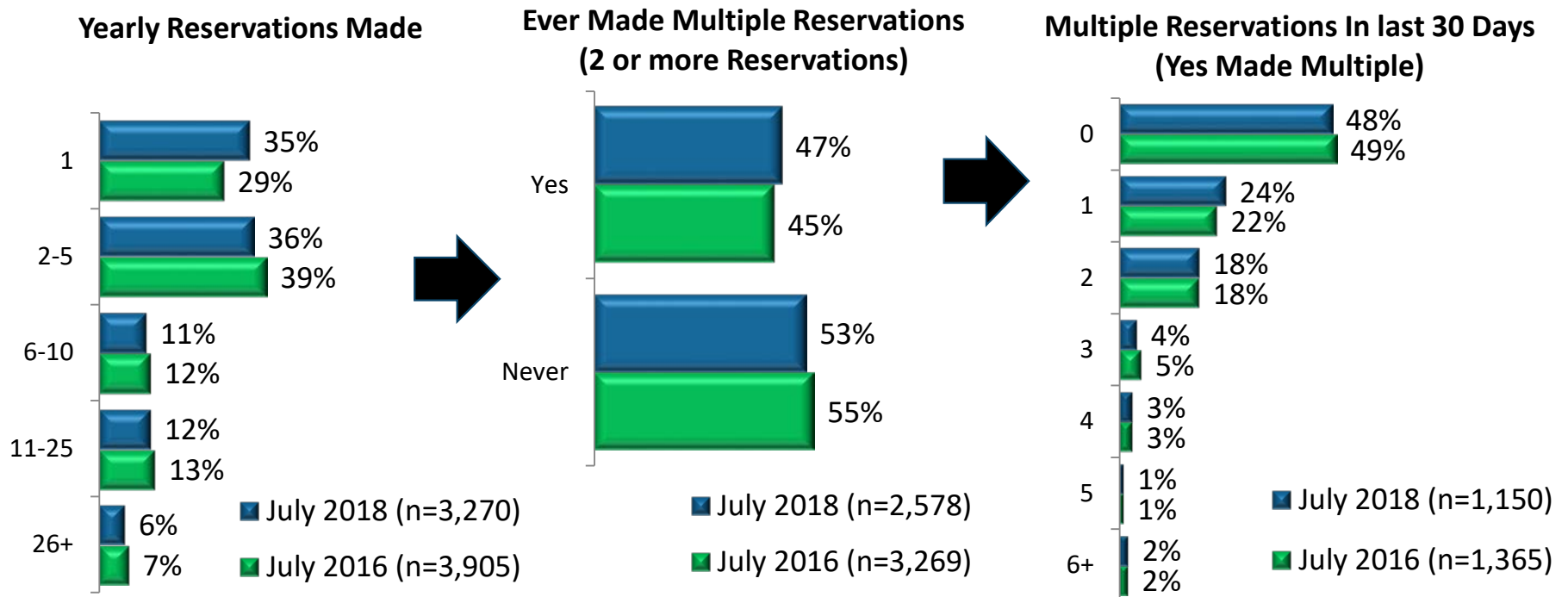
- ❖ Comments given by riders as to what method should be used to determine if you have arrived in line within 45 minutes included:
 - Take a camera shot of time/ferry line.
 - 45 minutes prior to the boat departing (not SCHEDULED, but ACTUAL), either have an agent walk down the line and put a slip under the windshield wiper of the last car, or write down the license number of the last car.
 - Have one of the workers walk the line with a hand held devise to confirm who has reservations.
 - Code of Honor. They can ask each car how long they were in line, most will be honest.
 - If I have paid for my ticket it is confusing as to why I have to be at the toll both 30 minutes before. In line 30 minutes before makes sense to me.

Q6j How should Washington State Ferries determine if a vehicle has arrived “on-time” for their reservation? If they ... Q6k By what method should WSF use to determine if you have arrived in line within 45-minutes ahead of your scheduled sailing?

Multiple Reservations



The 3,270 riders surveyed made an average of 6.8 reservations per year, similar to 2016 (6.9). The 2,578 riders who have used the WSF reservation system more than once were asked if they ever made multiple reservations for themselves for the same trip, and similar to 2016, almost half in 2018 (47%) said they had. Those who have ever made multiple reservations for the same trip were asked how many times they did that in the last 30 days. Again, similar to 2016, 52% in 2018 reported they have done so in the last 30 days. The average number of multiple bookings for the same trip is 1.0 per month, same as in 2016 for all those that have done so.



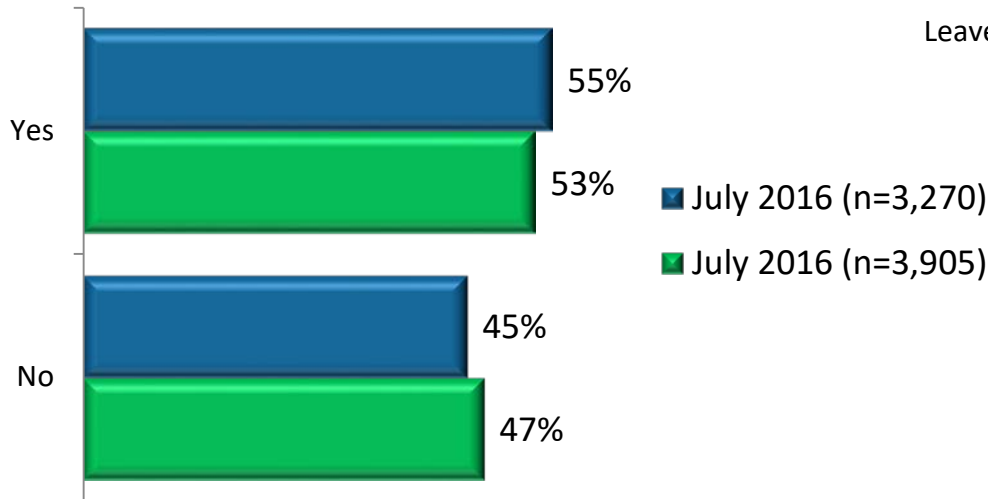
Q6d Approximately how many different reservations have you made in the last year? Q6d1 Have you ever made multiple reservations for yourself for the same trip (multiple sailings)? Q6e During the last 30 days, how many, if any, multiple reservations did you make for yourself for the same trip (multiple sailings)?

No-Show Fees & Multiple Reservations.

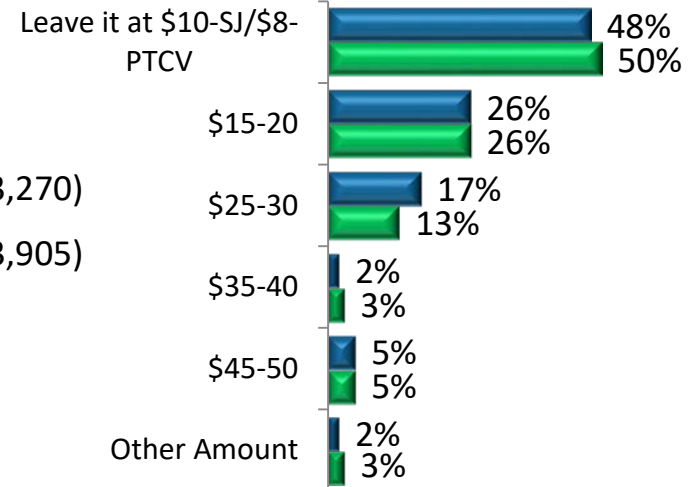


The 3,270 riders who have used the WSF reservation system were given a short background description on the impact of making multiple reservations for the same trip and asked if the no-show fees should be raised. Similar to 2016, 55% in 2018 said the no-show fees should be raised to \$24 compared to \$23 in 2016 (on average). Visitors to San Juan Islands (57%) are more likely to say increase the no-show fees than either part time San Juan Islands residents (54%) or full time San Juan Islands residents (39%). Those living on Lopez Island (46%) are more likely to want the no-show fees increased than Orcas (39%) or San Juan (36%) Island residents. The average increase based on all 3,270 respondents for the no-show fee is \$17 (in both 2018 and 2016).

Increase No-Show Fees



Suggested Amount

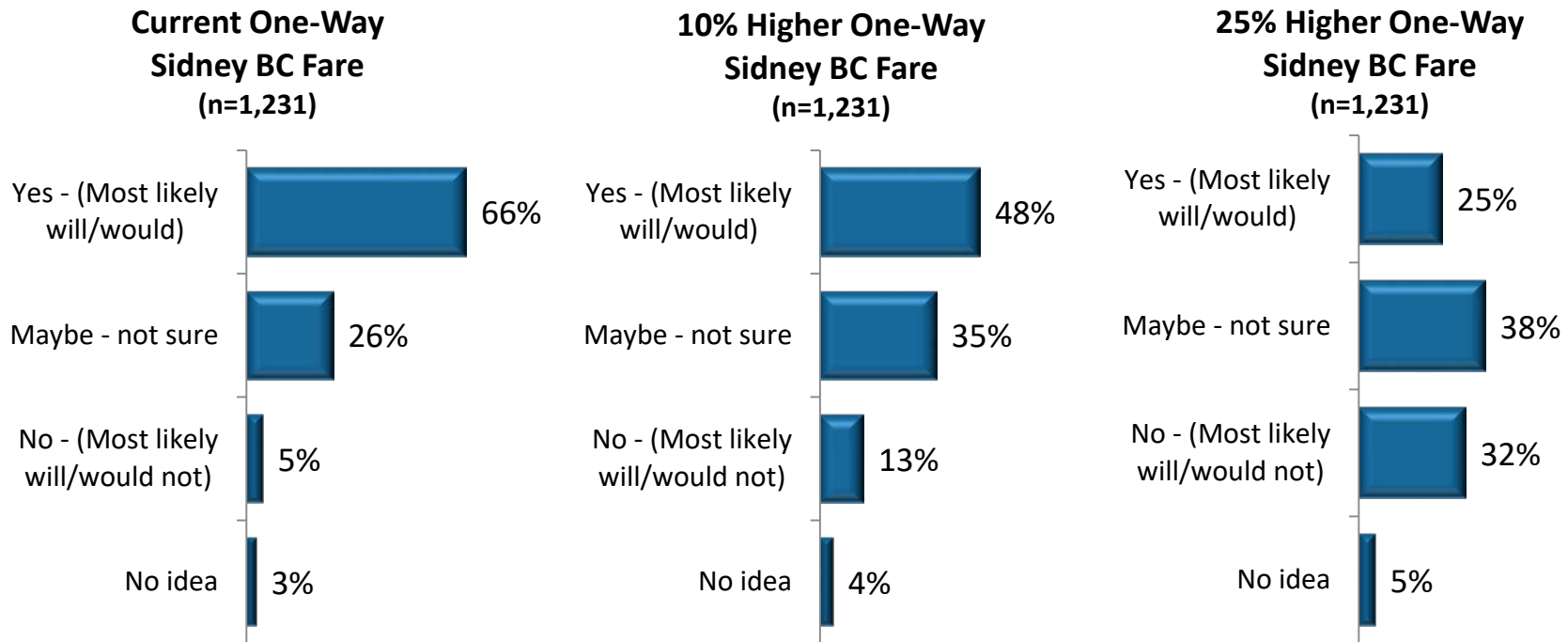


Q6n Background: The current no-show fees that most people pay for standard size vehicles is \$10 per no-show in San Juan (\$8 for Port Townsend/Coupeville). Some riders are booking multiple reservations on multiple sailings for their single trip which causes more boats to show as “full” on the reservation site. It also means boats may leave with space available given the no-shows by those riders. Question: Should the no-show fees be increased to cut down on the multiple reservation bookings on multiple sailings for a single trip? Q6o The current no-show fee for vehicles is \$10 in San Juan (\$8 for Port Townsend/Coupeville) for a standard size vehicle, what would you suggest the fee be increased to in order to cut down on multiple reservation bookings on multiple sailings for a single trip?

Anacortes/Sidney BC – Fare Impact on Trip



The 1,231 riders who have taken or are likely to take the Anacortes / Sidney BC route were asked if they would take the trip under the current fare structure (or if fares increased by 10% and 25%). Five percent (5%) said they would most likely not take the trip at the current fare level. Those saying “no” increased about 2.5 times when fares increased by 10% and 6.5 times when fares increased 25%.



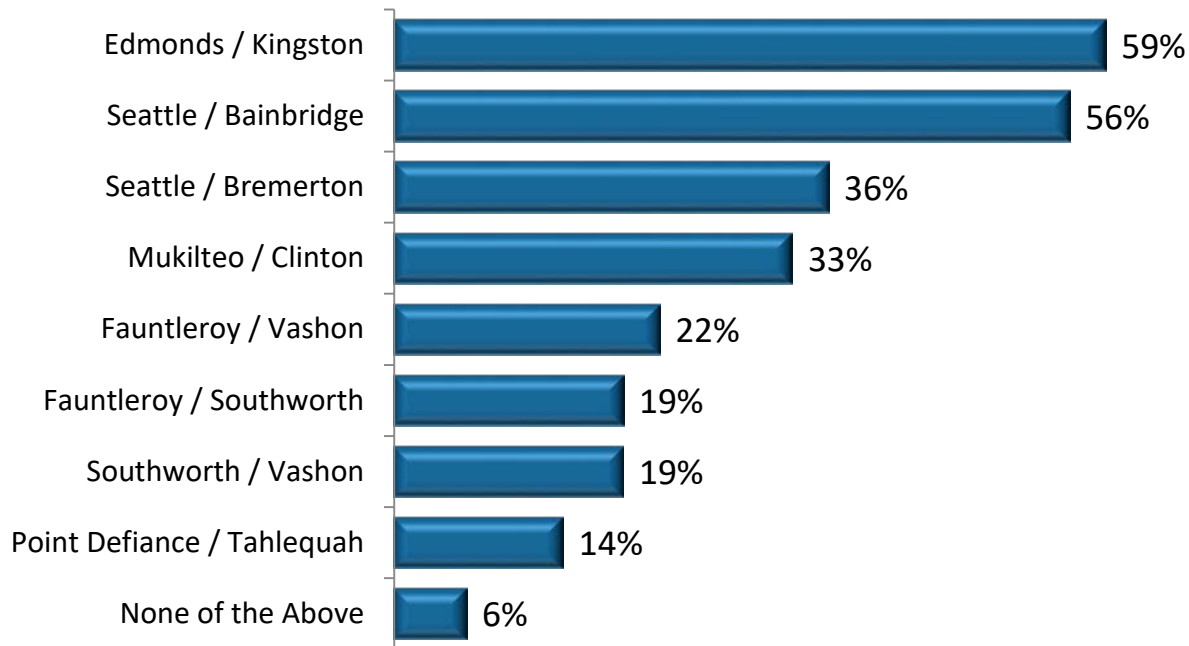
Q8b Given the Anacortes to Sidney BC ferry fares (One way fare - Walk-on \$19.85; Car <22ft \$68.95; RV 30> \$106.80; RV 31-40ft \$142.30), will you still take the ferry trip? Q8c If the Anacortes to Sidney BC ferry fare had been 10% higher, will you / would you still take the ferry trip? Q8d If the Anacortes to Sidney BC ferry fare had been 25% higher, will you / would you still take the ferry trip?

Route Usage



All respondents were asked if they had used in the last 2 years, or are likely to use in the next 2 years, any of the central Puget Sound routes. Fifty-nine percent (59%) said they had or will use the Edmonds / Kingston route, followed by Seattle / Bainbridge (56%), Seattle / Bremerton (36%) and Mukilteo / Clinton (33%). Approximately 6% of those interviewed have not and do not plan on using any of the central Puget Sound proposed reservation routes.

Used In Last 2 Years or Likely To Use In Next 2 Years (n=4,988)



Q.7d Which of the following central Puget Sound ferry routes, if any, have you taken in the last 2 years or are likely to take in the next 2 years? (Check all that apply)

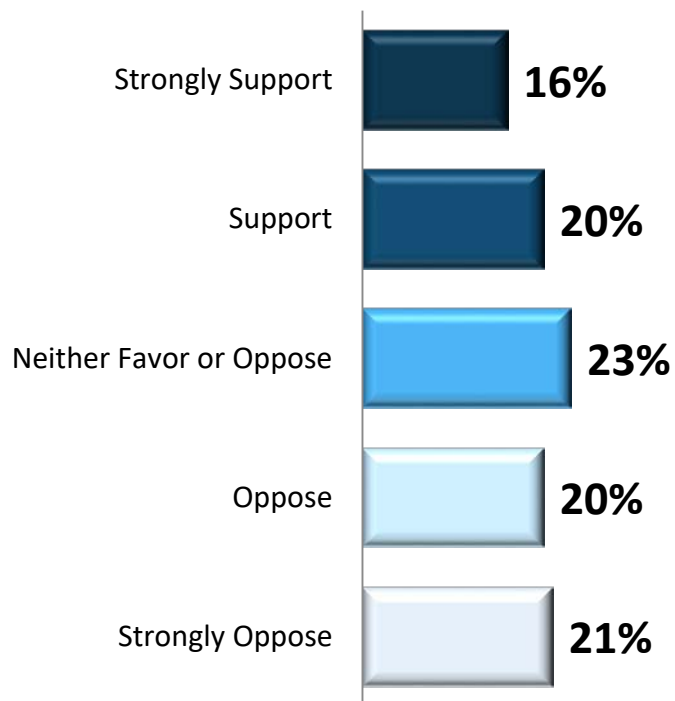
Potential Reservation Routes – Support & Why



Of those 4,088 riders who use or will use the Central Puget Sound ferry routes, slightly over a third (36%) would support developing a reservation system while 41% would oppose the development.

Support or Oppose the WSF Developing Reservation System for Central Puget Sound Routes

(n=4,088)



❖ Comments given by the 36% (n=1,488) who would support reservation expansion and how they want it to work included:

- 30% Feel WSF should use the existing reservation system
- 22% Feel regular riders should get some sort of priority
- 17% Feel the web/online system is a positive
- 16% Feel there are positive benefits to reservations
- 15% Want more unreserved space for unplanned trips

❖ Comments given by the 41% (n=1,557) who would oppose reservation expansion included:

- 40% Don't feel they can plan ahead effectively
- 35% Feel that it penalizes commuters / regular riders
- 21% Feel it just will not work / make things better
- 12% Feel first come / first serve is a better system
- 11% Feel reservation system is too hard

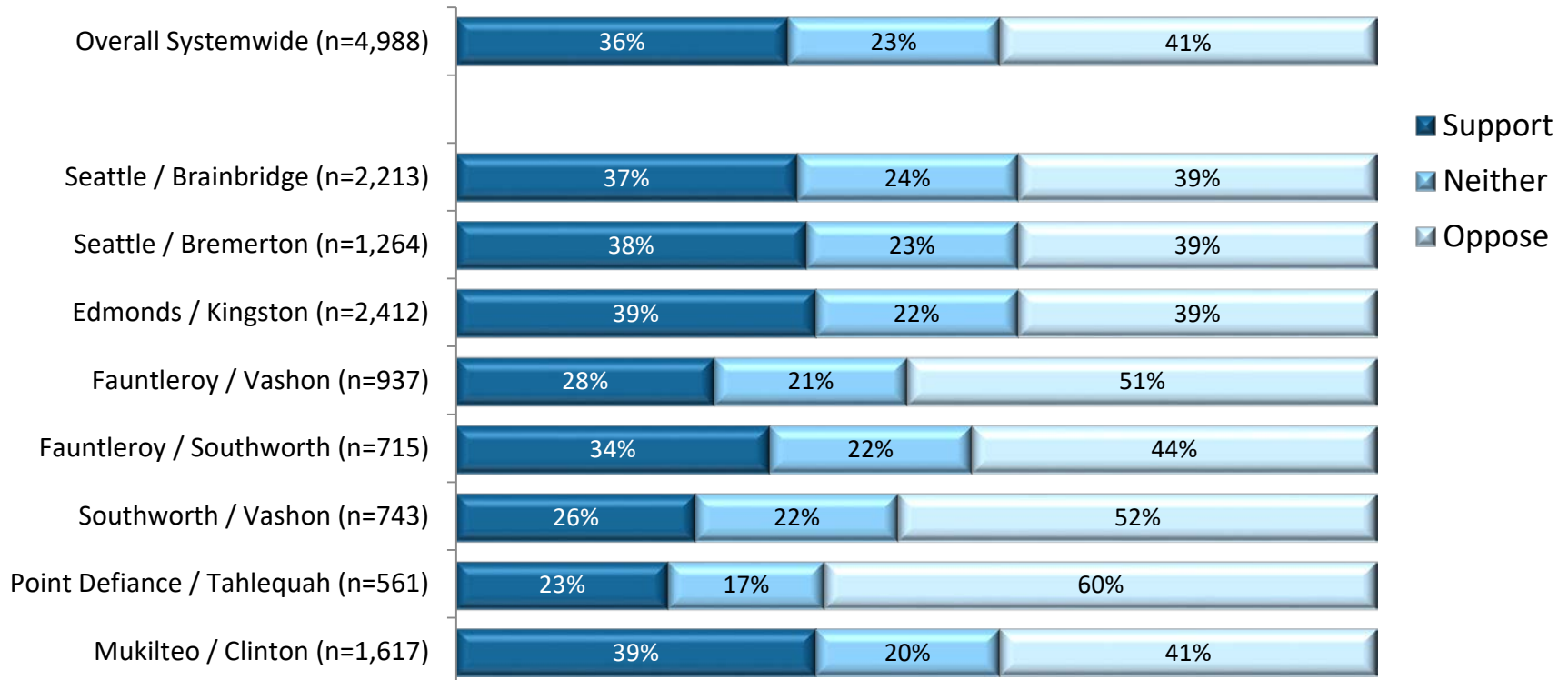
Q7e In general, would you support or oppose the concept of WSF developing a reservation system for the central Puget Sound ferry routes you take? Q7f Why would you oppose the concept of WSF developing a reservation system for the central Puget Sound ferry routes you take? Q7g How would you like the central Puget Sound reservation to work?

Potential Reservation Routes – Route Support



The support for WSF developing a central Puget Sound reservation system is uniform across users of all potential routes (support scores between 37-39 percent) except for those that travel on/off Vashon Island (support scores all under 30%) and to a less extent those that use the Fautleroy/Southworth route (34% support).

Support for WSF Developing Central Puget Sound Reservation System



Q7e In general, would you support or oppose the concept of WSF developing a reservation system for the central Puget Sound ferry routes you take? Q7f Why would you oppose the concept of WSF developing a reservation system for the central Puget Sound ferry routes you take? Q7g How would you like the central Puget Sound reservation to work?

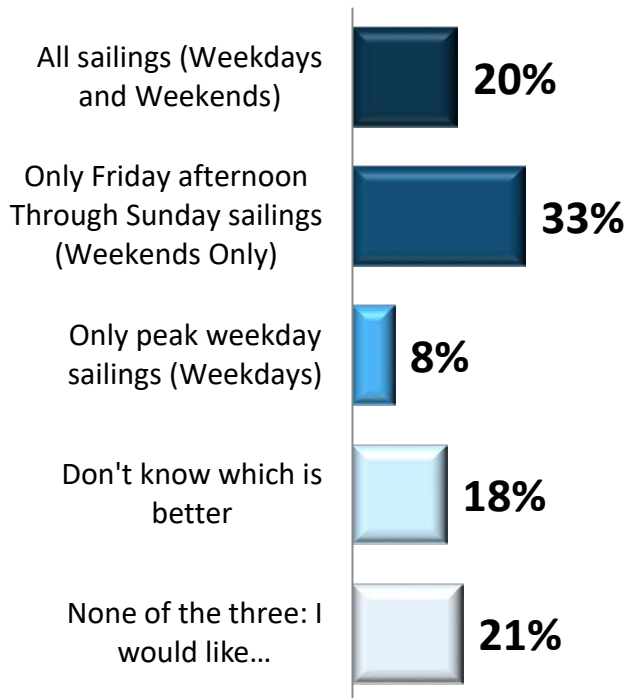
Potential Reservation Routes – Which Sailings?



Of those 4,088 riders who use Central Puget Sound ferry routes, one third (33%) would want reservations on only Friday afternoon through Sunday sailings. About one in five either want it on all sailings (20%), have a suggested alternative method (21%), or just don't know which is better (18%).

What Sailings Should Central Sound Reservations Be On?

(n=4,088)



❖ Comments given by the 21% (n=788) who said “none of the three; I would like” .. included:

- Don't want reservations / Want first come as it is.
- Priority to residents of WA state that depend on the ferry for transportation.
- Only during the summer season and only a small percentage like 20% able to be reserved.
- Exactly none of the above... NO RESERVATIONS!
- More frequent sailings.
- I don't see how reservations are even possible given the loading accommodations at some terminals. Also these are more of a commuter run than holiday / vacation plus traffic in Seattle, Tacoma is such that you could miss a ferry. Bad idea.
- Remember! There are NO buses at Bainbridge Island for passengers to use in evenings. The lack of last minute reservations will not then allow people to go on as passengers only when there are NO BUSES.

Q7h If WSF did develop a reservation system for the central Puget Sound ferry routes and there were three choices to select from, would you prefer ... ?

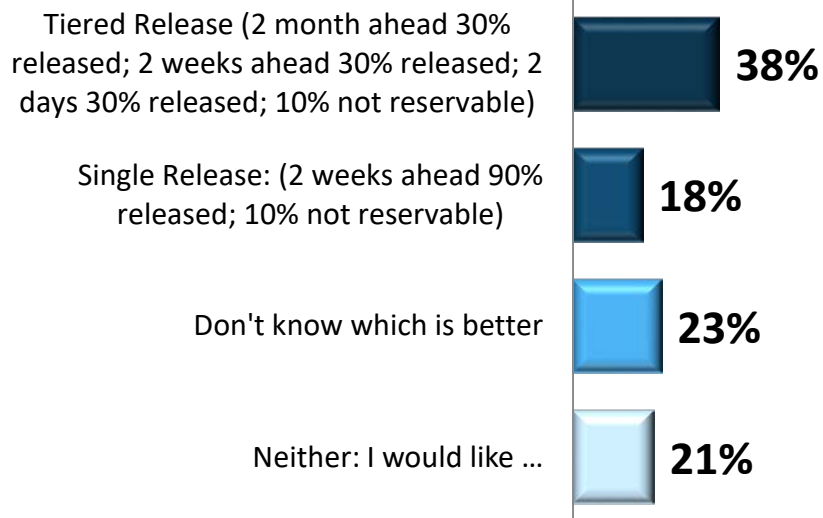
Potential Reservation Routes – Release Plan



Of those 4,088 riders who use Central Puget Sound ferry routes, over one third (38%) would suggest the current tiered release structure be used. About one in five either want a single release (18%), have a suggested alternative method (21%) or just don't know which is better (23%).

Tiered or Single Release Preference

(n=4,088)



- ❖ Comments given by the 21% (n=783) who said “neither; I would like” .. included:
 - 50% available for all trips after midnight on weekdays.
 - 70% reservation cap for every crossing.. . 30% Always available for travelers and incidental use.
 - No reservation system!
 - NO NO! Less than 50% un-reservable would be a disaster!
 - Similar to the Tiered release, except that each release is only 10% and the third & final release is at 6 hours prior to sailing. Thus, only 30 percent is reservable.
 - Commuters are able to reserve a spot for normal commuter trip times and have a monthly pass or something that guarantees commuters first choice on sailings.

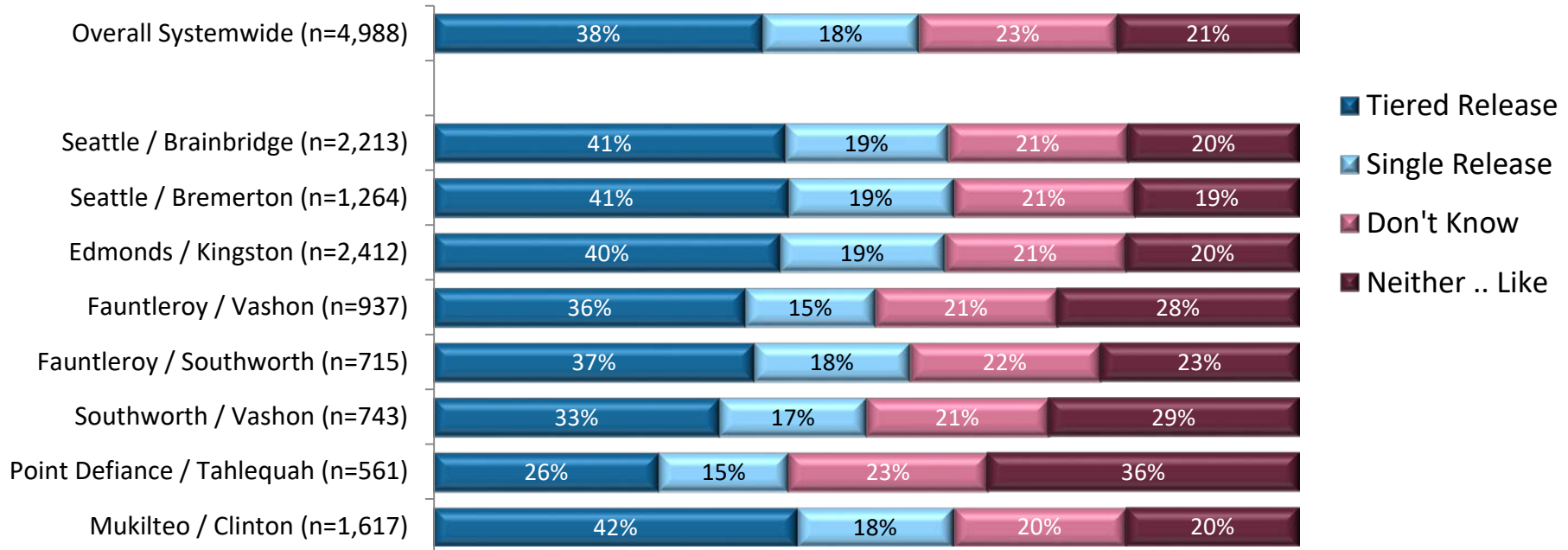
Q7i The following is a brief overview for context: San Juan reservations are available for up to 90% of the sailing space, but it is offered up on a tiered basis. Two months ahead of the sailing schedule, 30% of the space becomes available for reservations. Two weeks prior to any individual travel day, an additional 30% becomes available. The remaining 30% becomes available two days prior to the travel day. Questions: If WSF did develop a reservation system for the central Puget Sound ferry routes and there were only two choices to select from, would you prefer it be a tiered release like in the San Juan's, or a single release where all the space is available for reservations at once? Responses: (1) Tiered Release: Two months ahead of any individual travel/sailing day, 30% of the space becomes available for reservations. Two weeks prior to any individual travel day, an additional 30% becomes available. The remaining 30% becomes available two days prior to the travel day. And 10% is not reservable. (2) Single Release: Two weeks ahead of any individual travel/sailing day, 90% of the space becomes available for reservation. And 10% is not reservable (3) Don't know which is better ... (4) Neither: I would want something like ...

Potential Reservation Routes – Release Plan



The tiered release plan is the most liked by all potential reservation riders except those riding or planning to ride the Point Defiance/Tahlequah route.

Tiered or Single Release Preference



Q7i The following is a brief overview for context: San Juan reservations are available for up to 90% of the sailing space, but it is offered up on a tiered basis. Two months ahead of the sailing schedule, 30% of the space becomes available for reservations. Two weeks prior to any individual travel day, an additional 30% becomes available. The remaining 30% becomes available two days prior to the travel day. Questions: If WSF did develop a reservation system for the central Puget Sound ferry routes and there were only two choices to select from, would you prefer it be a tiered release like in the San Juan's, or a single release where all the space is available for reservations at once? Responses: (1) Tiered Release: Two months ahead of any individual travel/sailing day, 30% of the space becomes available for reservations. Two weeks prior to any individual travel day, an additional 30% becomes available. The remaining 30% becomes available two days prior to the travel day. And 10% is not reservable. (2) Single Release: Two weeks ahead of any individual travel/sailing day, 90% of the space becomes available for reservation. And 10% is not reservable (3) Don't know which is better ... (4) Neither: I would want something like ...



THANK YOU!

For More Information Contact:

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